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ABSTRACT

An overview is provided of the planning processes used at Okaloosa-Walton Community College (OWCC) in budgeting and curriculum, staff, and program development. First, the curriculum planning process is described in terms of its purpose; faculty, staff, and administrator involvement; educational goals for OWCC; the development of evaluation procedures; and the use of evaluation results. This section highlights the active participation of faculty, counselors, and librarians in the development and structuring of the official college purpose statement, as well as faculty roles in program design, syllabi development, and instruction. It also describes the support roles played by departmental staff and the decision-making roles of the dean of instruction and other instructional managers. Next, the same facets are discussed for staff and program development and budgeting. Finally, charts are provided to illustrate the planning process. (AJL)

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PLANNING PROCESSES IN INSTRUCTIONAL SERVICES

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July 1988

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ABSTRACT

PLANNING PROCESSES IN INSTRUCTIONAL SERVICES
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This paper is in two parts: the **first** is a narrative dealing with steps in the instructional services planning process in selected areas: 1. curriculum, 2. staff and program development, and 3. budget. The narration discusses specified categories in each of the following areas: 1. purpose; 2. stages of faculty, staff, and administrative involvement; 3. educational goals; 4. development of evaluation procedures; and 5. use of results. The **second** part displays variations of the planning process in chart form.

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PART ONE

Curriculum

1.1 Purpose. The body of courses, programs, and other organized experiences designed to meet student and community educational needs. The curriculum framework follows the institutional purpose as developed by a cross section of college personnel.

1.21 Faculty involvement. Teaching faculty, counselors, and librarians are usually included in the faculty category, and these three groups of professional personnel have participated actively in the development and structuring of the official College purpose statement. Faculty members participate in designing programs to meet community and individual needs, and they are responsible for preparing the course syllabi which are processed for approval through the appropriate department chair and/or division head, the Dean of Instruction, and the College Curriculum Committee. Following approval of individual courses, faculty member are responsible for developing lesson plans, teaching classes, advising students, evaluating instructional effectiveness, and for processing via the instructional administrative chain the necessary paperwork to assure that textbooks and other class materials are maintained in the bookstore for student purchases.

1.22 Staff (career service personnel) involvement with curriculum includes representation on the committee which developed the draft College purpose statement. Departmental staff members assist faculty and instructional administrators in preparing curriculum and course materials for the approval process, for scheduling, and for teaching. Staff members support the curriculum through work in the library, the audio-visual department, off-campus centers, and specialized coverage of science and math laboratories. Staff members interact professional administrators, faculty, students, the general public, and with other administrative areas of the College for the benefit of the curriculum and the students whom it serves.

1.23 Administrative involvement with the curriculum includes the Dean of Instruction interacting with all instructional managers (division/department heads) within the advanced and professional disciplines for program , course, and class schedule development. He is responsible for supervision of the College student record system, including the development of class schedules each term; it is through this function that he receives class data from the technical-industrial divisions and departments, combining with A & P data, and then inputting and maintaining such class data through computer terminals in the "A" building. The Dean of Instruction receives and coordinates all course and program requests which flow through the curriculum committee and to the President for approval. Such actions typically originate at the division/department level and flow through the respective dean to the curriculum committee.

Division and department heads are responsible for development of new programs and courses to meet student educational needs and for coordinating semester class schedules. These instructional administrators also coordinate student advising within their departments, assisting teachers and students as needed with program development.

Off-campus center directors develop proposed semester class offerings based on student and community needs, coordinating the scheduling of such courses via the appropriate division or department head. Overall program and course coordination for the centers is supervised by the respective A & P and technical-industrial dean. Center directors and a full-time counselor/ advisor at each center advise students on program and course selection. They also administer placement exams, register students, and perform other required tasks.

The Registrar/Director of Admissions works with the Dean of Instruction for effective implementation of college-wide admission and registration functions. He is responsible for such functions both on the Niceville campus and at all off-campus sites, and works with the center directors to assure proper processing to meet instructional requirements.

The Learning Resources Center director and other professional librarians work directly with division and department heads to provide for needed services and materials, both on the Niceville campus and at each off-campus center. Librarians and support staff respond to faculty instructional needs in providing appropriate LRC services, including orientation tours for classes and individual students. The staff provides for specialized LRC materials for classes, including A-V equipment and software for all teaching locations plus other related services to teachers students, and administrators in support of the curriculum.

1.3 Educational goals for the College, i.e., purpose and goal statements, are developed by administrators, faculty members, staff personnel, students, and trustees working cooperatively to meet specific community and student educational needs.

1.4 Development of evaluation procedures. Evaluation of program effectiveness is accomplished through the efforts of the deans working with their respective division and department heads and utilizing enrollment and performance data provided by the college data center. Evaluations are further

accomplished through surveys developed at all levels of the academic administration.

1.5 Uses of evaluation results. Survey data are made available to department administrators which are shared with faculty and discussed in department meetings. These data are also reviewed by the curriculum committee and by individual faculty members for the purpose of improving instruction. Locally produced and statewide performance data are utilized by all interested personnel to seek better ways of fulfilling institutional goals and objectives.

Staff and Program Development

2.1 Purpose. The S & P D program serves all personnel and programs of the College and is designed to enhance services and skills related to the college purpose and goals.

2.21 Faculty involvement. Faculty participate on the S & P D program development committee in establishing annual guidelines for utilization of allocated resources (2% of previous year operating budget). Faculty members prepare proposals for use of funds and compete for their use. Proposals are submitted via the various principal administrators for approval by the S & P D committee and then by the President. When requests for funds exceed limits established in the annual plan, the S & P D program committee reviews the proposals and makes recommendations to the President or his designee.

2.22 Staff involvement. Staff participate on the S & P D program development committee in establishing annual guidelines for utilization of resources. Proposals for use of these monies may be submitted by staff members, and any that request funds in excess of established limits are referred to the S & P D committee for approval.

2.23 Administrative involvement. An administrator is assigned to the S & P D program development committee as executive secretary. This position handles the administrative details of the program, assuring proper use of allocated resources. Division and department heads coordinate the development of meaningful proposals among their respective personnel and generally supervise or oversee their implementation and evaluation. Subsequent to development and approval at the department level, the respective dean approves or disapproves project proposals and forwards them to the S & P D committee for determination of fit within available resources.

2.3 Educational goals. According to the S & P D program plan, the following goals are established for this program:

2.31 The improvement of staff performance through activities which update or upgrade competence specified for present or planned positions. Staff is interpreted to include all full-time, regular personnel employed by the college.

2.32 The evaluation and improvement of existing programs and creation of new programs, including the design of evaluation instruments to establish bases for improvements as well as the designing of new

programs (not the maintenance or expansion of existing programs).

2.4 Evaluation procedures. Individual project developers are responsible for designing adequate evaluation procedures for each project for which funding is requested. Each level in the chain of command for approving S & P D requests reviews the proposals prior to authorization of funding and again at the conclusion of the events or activities when the narrative report and evaluation statement are finalized.

2.5 Uses of results. Narrative reports, together with the evaluation process and results, are reviewed by the S & P D committee, instructional departments, and faculty with the more notable examples highlighted for wider consideration.

Budget

3.1 Purpose. The budget-making process is the preparation of an annual statement of the estimated income and expenses of the college. The principal sources of income which the college is expected to effectively and efficiently manage are from state appropriations, student fees, federal funds, gifts, and grants. The annual budget is established and implemented in compliance with State Board Rules for utilizing resources in support of the college purpose, its goals, and objectives.

3.2 Faculty involvement. As the personnel responsible for teaching classes, counseling students, and other "first-line" interactions with clients of the institution, teachers, counselors, and librarians provide direct input to the annual budget through their division or department head. Input is in the form of discussions, memoranda, and other documentation specifying specific resources which will be needed, both required and desirable, during the coming year in support of their particular part of the college mission. Effective when the annual budget is approved for implementation, authorized resources may be requisitioned and utilized by faculty in support of classes and other functions.

3.22 Staff involvement. Support staff at all levels may submit proposals for use of S & P D and other approved resources when related to their specialized assignments. (Suggestions and recommendations for more efficient use of resources, regardless of institution location, is welcomed.) Clerical and other staff work with faculty and administrators in preparation of requisitions, purchase orders, and they assist extensively in assuring proper utilization of resources.

3.23 Administrative involvement. Annual budget preparation begins with the distribution from the Dean of Administrative Affairs to the unit administrators via their respective dean of work sheets containing the best estimate of available resources for the coming year. These administrators are made aware of specific guidelines and restrictions which must be considered in developing the annual financial plan for their division, department, off-campus center, or other administrative unit. The administrators receive recommendations and guidance from all members of their respective units before finalizing their annual budget request.

When finalized, the unit budget requests are reviewed by the dean, and when he is satisfied that the requests are needed, appropriate, properly documented, and will be within available resources, or adequate justification is provided if not, the budget proposals are then forwarded to the Dean of Administrative Affairs to be compiled into an institutional report for review and consideration by the president and dean's council. This body of administrators analyzes the total budget in terms of anticipated available funds and the relationship of requests to the overall college mission; requests that are beyond anticipated budget resources for a given unit must, if viewed by the dean's council as essential and/or desirable, be funded from planned unallocated sources (contingency or fund balance). Dean's council recommendations are made to the president who makes the final determination of budget plans for presentation to the Board of Trustees for their consideration and adoption.

Upon adoption by the Board of the annual budget, administrators at all levels are responsible for effective and efficient use of available funds. Purchase requisitions are prepared by and flow from the administrative units to the purchasing office via the respective dean. Each administrator is responsible for assuring that his or her unit functions within the approved allocation, and when additional funds are needed for justifiable purposes, written requests documenting the extenuating, nonrecurring circumstances are processed via the dean to the president for consideration and approval.

3.3 Educational goals. The college budget is expected to meet the following specific goals:

3.31 Provide for an instructional curriculum which is able to fully meet the stated institutional purpose and goals;

3.32 Provide for satisfactory levels of instructional equipment, teaching supplies, and other necessary support materials and resources to enable all personnel to fulfill their college mission or assigned responsibilities;

3.33 Provide funds at satisfactory levels to support staff and program development activities for enhancing institutional effectiveness;

3.34 Provide salary resources to keep the institution among the top 3 to 5 Florida community colleges;

3.35 Provide for and maintain at satisfactory levels educational facilities at all appropriate locations within the district which facilitate superior instruction in all disciplines designed to fulfill the college purpose and goals.

3.4 Evaluation procedures. Effectiveness of the approved college budget is determined by the personnel responsible for providing instructional and other services for students and community through periodic analyses in terms of overall goals.

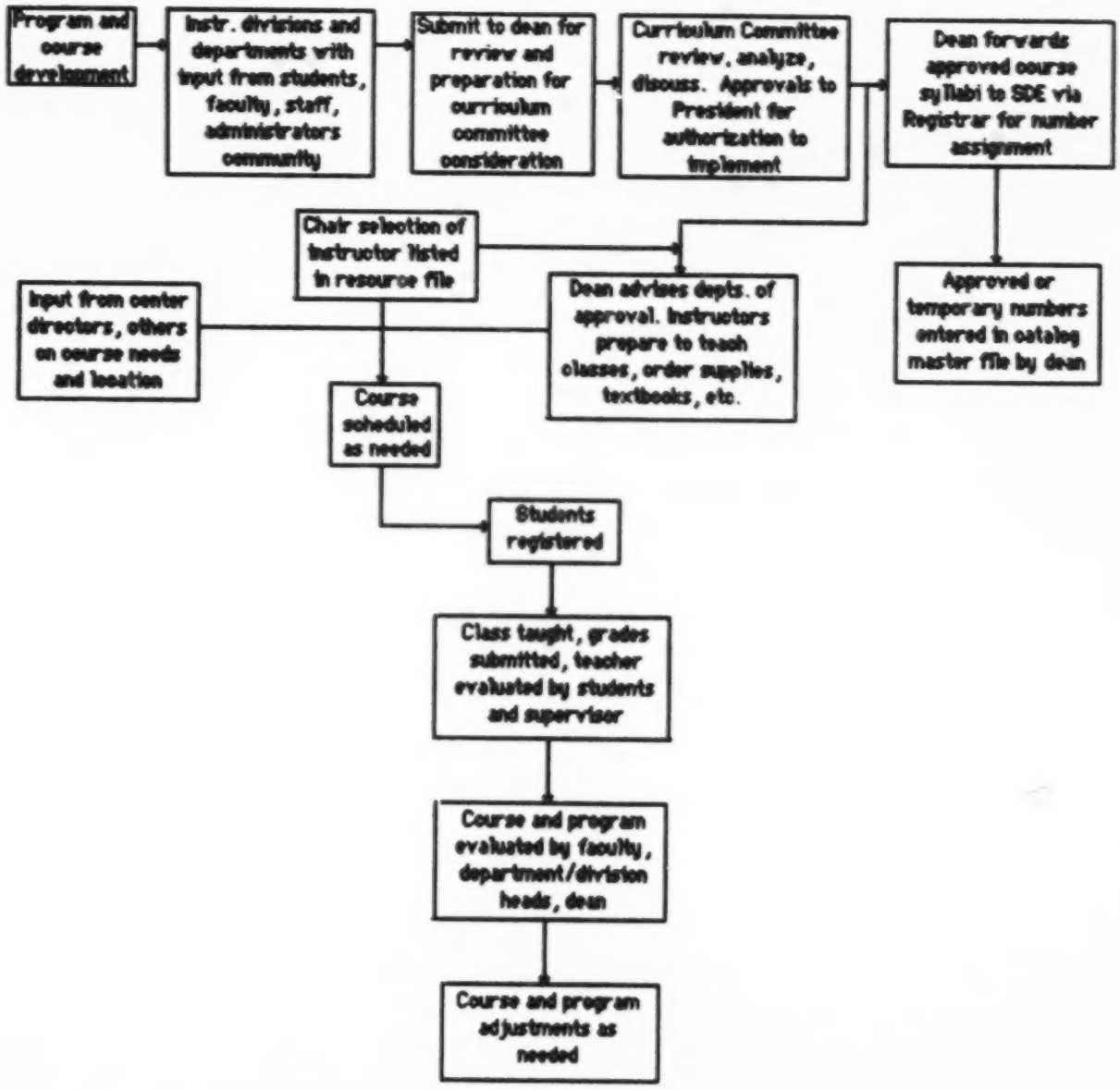
3.5 Use of results. Budget analysis data are utilized by the unit administrators (those responsible for managing division, departmental, and other budgets) to assure continuation of adequate levels of resources. Such data are used by unit administrators and their dean to make appropriate adjustments within and

among budget categories and organizational codes for more effective utilization of available funds. When funds have been depleted in a given organizational unit and other sources are not readily apparent from which to obtain needed resources, requests are then submitted to the president for assistance in providing additional funds from contingency and carryover accounts.

PLANNING PROCESSES IN INSTRUCTIONAL SERVICES

PART TWO

Curriculum Development


Program and course development
Instr. divisions and departments with input from students, faculty, staff, administrators community
Submit to dean for review and preparation for curriculum committee consideration
Curriculum Committee review, analyze, discuss. Approvals to President for authorization to implement
Dean forwards approved course syllabi to SDE via Registrar for number assignment
Chair selection of instructor listed in resource file
Input from center directors, others on course needs and location
Dean advises depts. of approval. Instructors prepare to teach classes, order supplies, textbooks, etc.
Approved or temporary numbers entered in catalog master file by dean
Course scheduled as needed
Students registered
Class taught, grades submitted, teacher evaluated by students and supervisor
Course and program evaluated by faculty, department/division heads, dean
Course and program adjustments as needed

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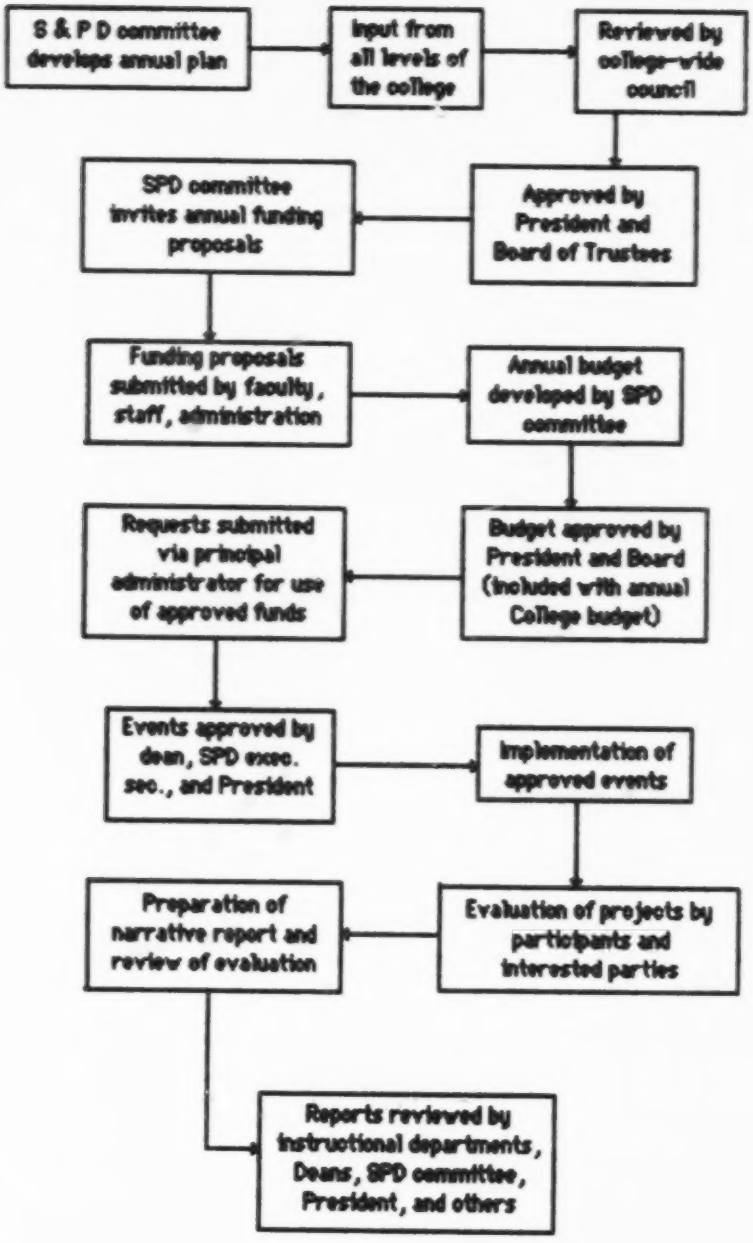
Staff and Program Development


S & P D committee develops annual plan
Input from all levels of the college
Reviewed by college-wide council
SPD committee invites annual funding proposals
Approved by President and Board of Trustees
Funding proposals submitted by faculty, staff, administration
Annual budget developed by SPD committee
Requests submitted via principal administrator for use of approved funds
Budget approved by President and Board (included with annual College budget)
Events approved by dean, SPD exec. sec., and President
Implementation of approved events
Preparation of narrative report and review of evaluation
Evaluation of projects by participants and interested parties
Reports reviewed by instructional departments, Deans, SPD committee, President, and others

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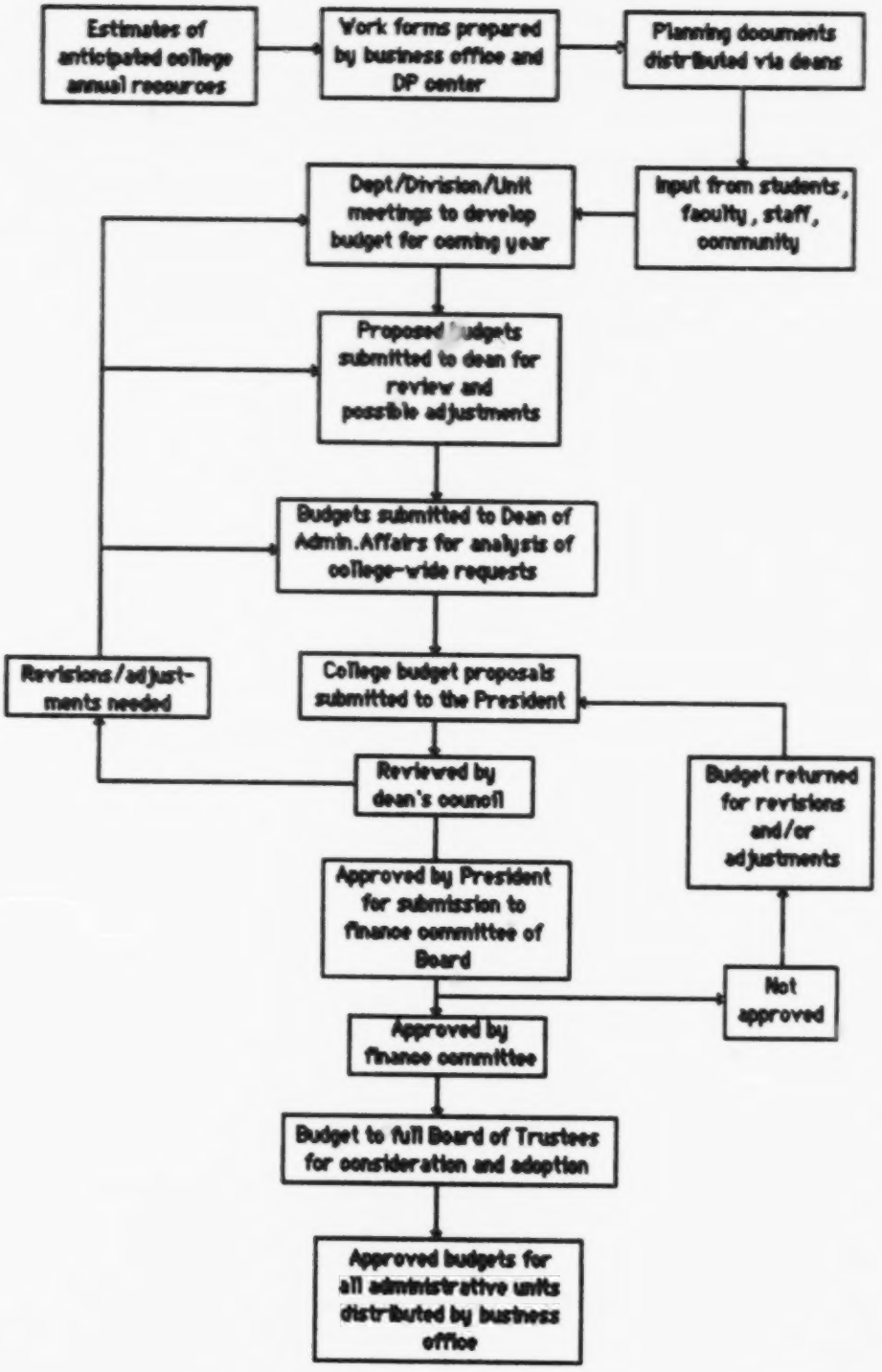
Budget Process


Estimates of anticipated college annual resources
Work forms prepared by business office and DP center
Planning documents distributed via deans
Input from students, faculty, staff, community
Dept/Division/Unit meetings to develop budget for coming year
Proposed budgets submitted to dean for review and possible adjustments
Budgets submitted to Dean of Admin.Affairs for analysis of college-wide requests
College budget proposals submitted to the President
Revisions/adjustments needed
Reviewed by dean's council
Budget returned for revisions and/or adjustments
Approved by President for submission to finance committee of Board
Not approved
Approved by finance committee
Budget to full Board of Trustees for consideration and adoption
Approved budgets for all administrative units distributed by business office

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Summary

This paper provides a discussion in **part one** of the planning functions and activities of curriculum; staff and program development; and the budgeting process with respect to the following: 1. purpose; 2. stages of involvement by faculty, staff, and administration; 3. educational goals; 4. evaluation procedures; and 5. use of results. **Part two** presents variations of the planning process in chart form.

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